Quick Reference Tip Sheet

GEARS — General Enterprise And Resource Support

LAST REVISED DATE: 06/03/2019

General Information

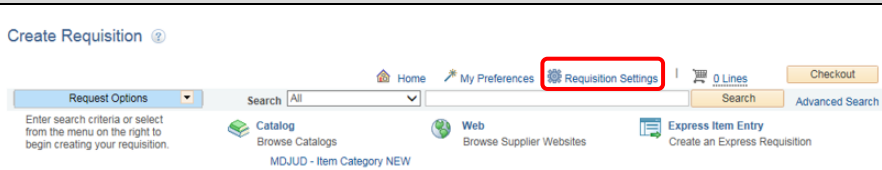| Task	Process Information
Creating an eProcurement Requisition for Inventory Assets (using Express Item Entry) **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	An Express Item Entry Requisition is created in the eProcurement module for procuring assets that <u>will be received in an Inventory Warehouse location (AOCWH02, DCITWH01, DCWH02, etc.)</u>. An Item ID is required on an Express Item Entry Requisition. Each Item ID is associated with an Asset Profile ID. An Asset Profile ID is required when using an asset-related category/account (0701, 10xx, 11xx, 14xx) on a requisition or PO.

GEARS Navigation

Main Menu > eProcurement > Requisition	Favorites ▾ Main Menu ▾ > eProcurement ▾ > Requisition

Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	**Click on the link Requisition Settings. This is where you'll setup the defaults for your Requisition.**	

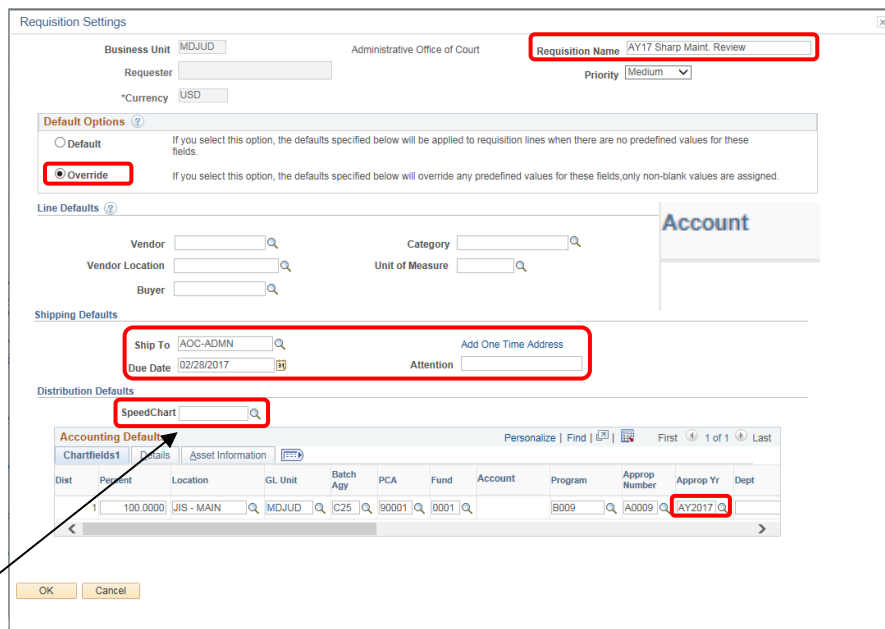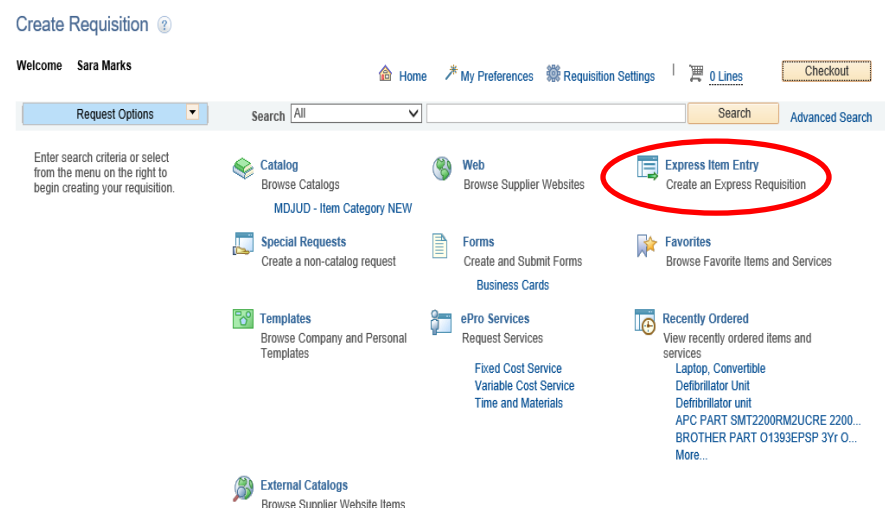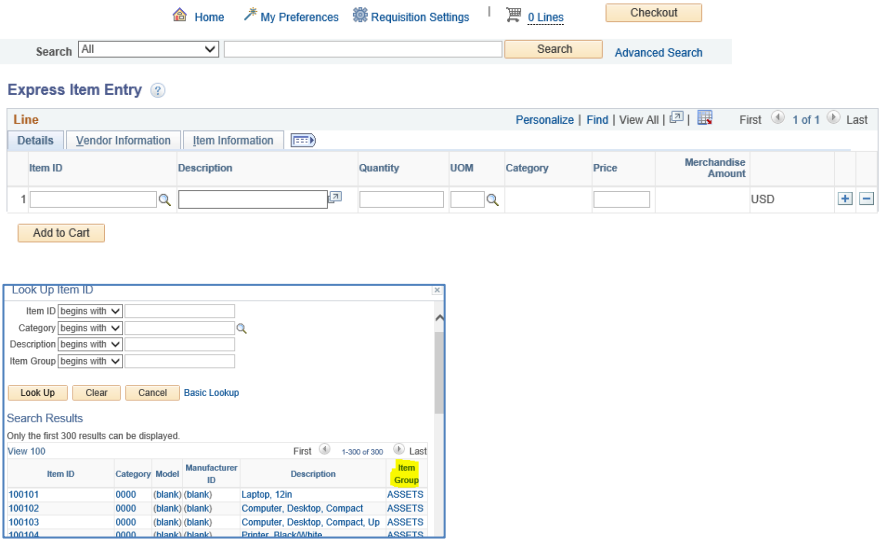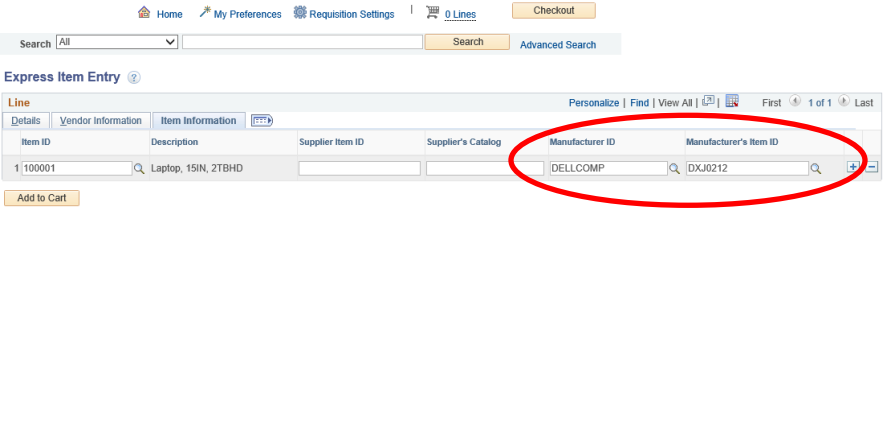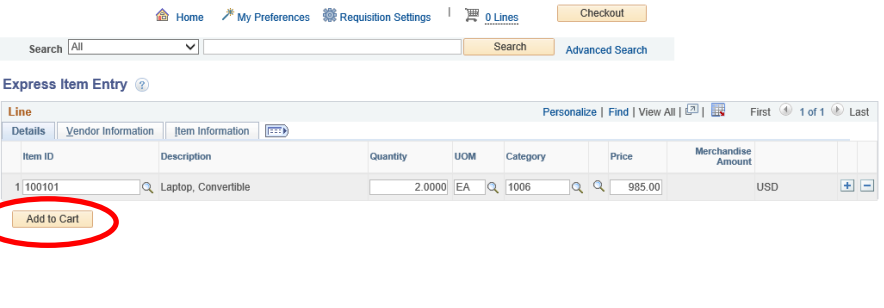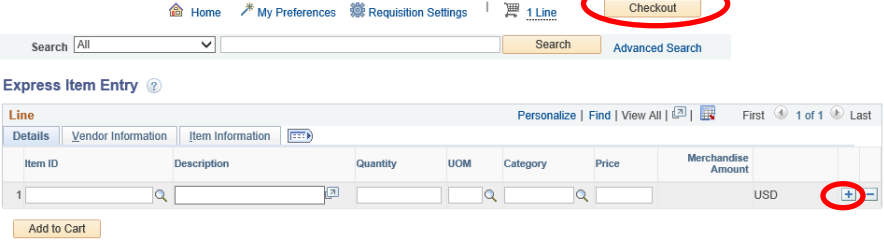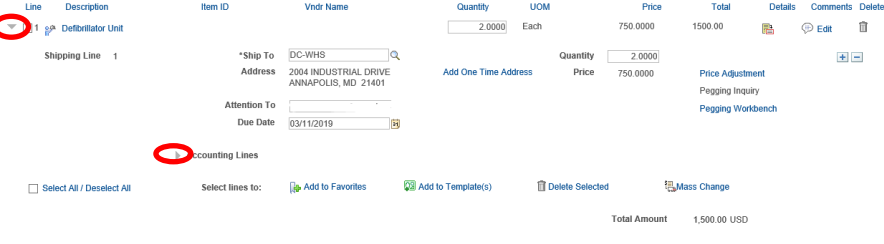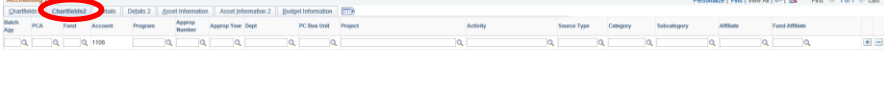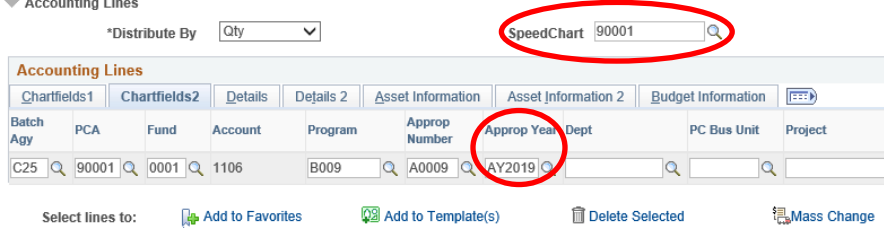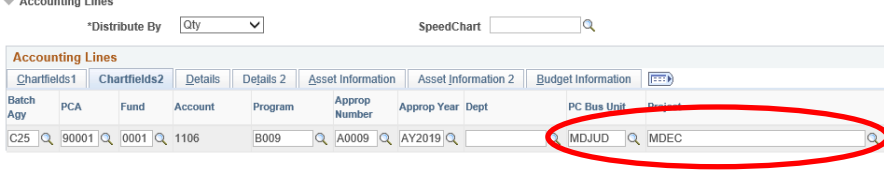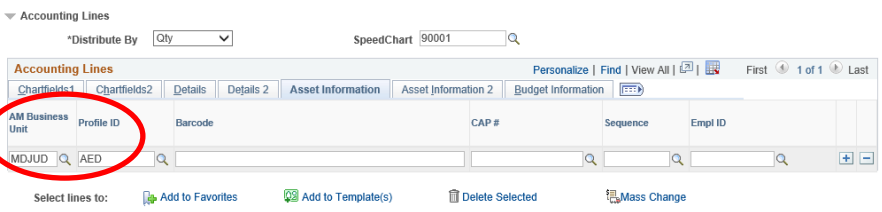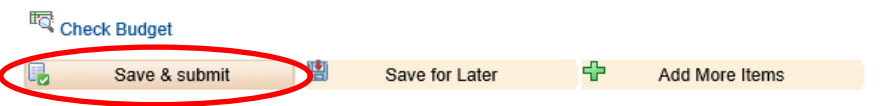|		
2.	**On the pop-up window that opens, enter your Requisition name.** **NOTES:** A. It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, AY17 Sharp Maint Review. Requisition Name: [_____] B. Click on the **Override** radio button. The defaults entered on steps C & D will populate on **ALL** your requisition lines. C. Enter the **Ship To, Due Date** and **Attention** fields, if needed. **NOTE:** The **Ship To** should be a warehouse location (AOCWH02, DCITWH01, DCWH02, etc). D. To use the **SpeedChart** field, you can search for your PCA by using the 🔍 feature. Notice that the **Account** and **Approp Yr** Chartfields are blank and **Account** is grayed out. Enter the **Approp Yr**.	 **Multiple PCA's per line:** If you need to divide the expenses on your Req. lines to multiple PCA's on a percentage basis, it can be done on this page. Please contact GEARS support, if you need help with this feature.	
3.	**Click the** [OK] **button.**	
4.	**Click on the link for Express Item Entry.**	
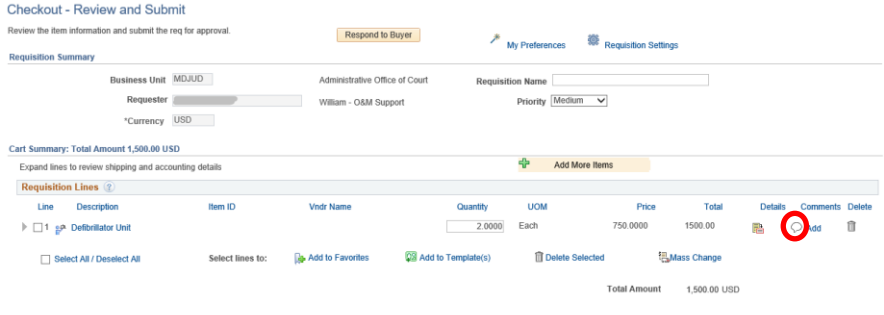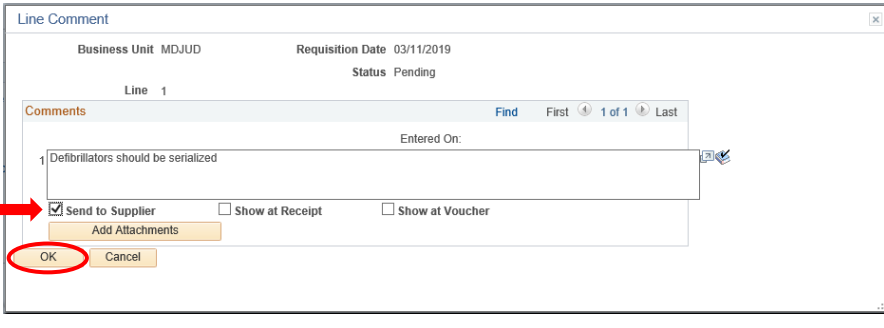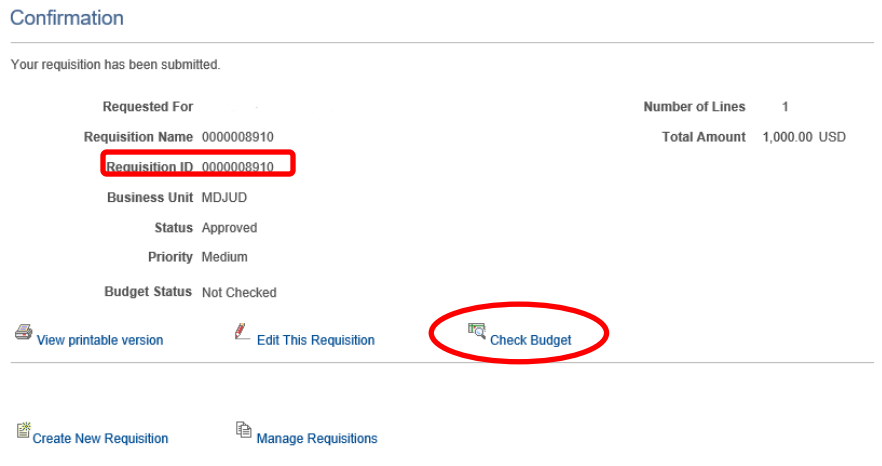
5.	Enter/select the following: **Item ID** **Quantity** **Category (Account)** **Price** <u>**NOTE:**</u> Be sure the Item ID selected has an Item Group of ASSETS. <u>**NOTE:**</u> Be sure to use an asset-related Category/Account (0701, 10xx, 11xx, 14xx).	
6.	**Click on the Item Information tab and enter/select the following:** **Manufacturer ID** **Manufacturer's Item ID (Model)** Manufacturer ID is a searchable list. Select "Other" if the Manufacturer does not exist in the list, or is unknown. Manufacturer's Item ID (Model) is a free-form text field. Enter an appropriate value.	
7.	<u>**NOTE:**</u> Before adding the line to the cart, double-check that there are no typos or other issues. Once added, the line will need to be deleted and a new line added. **Click the** [Add to Cart] **button.**	
8.	**Continue adding additional lines as needed. When done, click on the** [Checkout] **button.**	

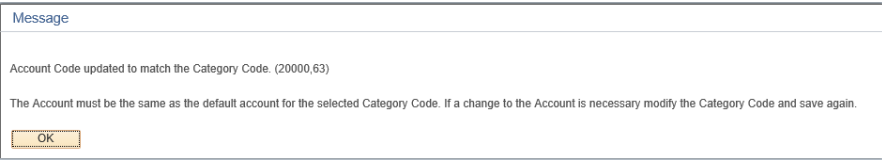|		
9.	Select the **Add Comment** icon ◯ at the far right of the line.	
10.	**You can add comments in the Comments Section, and also click on the** Add Attachments **button to add attachments.** When done, select the **Send to Supplier** checkbox. Click the OK button.	
11.	**Click on the** ▶ **icon to the left of the Line. Then click on the** ▶ **icon to the left of Accounting Lines to expand (if not already expanded).**	
12.	Click on the **Chartfields2** tab to enter/review your chartfield information.	
13.	If you need to enter/change the PCA, you can do that by entering the PCA in the **SpeedChart** field. If you change the PCA, you'll also have to re-enter the **Approp Yr.**	
14.	**For JIS Projects**, enter PC Bus Unit (MDJUD), and enter the appropriate Project, Activity and Source Type.	

15.	Click on the **Asset Information** tab and verify the following: **AM Business Unit** (MDJUD) **Profile ID** (will default from the Item ID) <u>**NOTE:**</u> A Profile ID is required when using an asset-related category/account (0701, 10xx, 11xx, 14xx) on a requisition or PO.	
16.	Click the [Save & submit] button.	
17.	A message might be displayed indicating that the Account Code was updated to match the Category Code. This ensures that the Category Code and Account Code always agree. Click on the [OK] button.	Message Account Code updated to match the Category Code. (20000,63) The Account must be the same as the default account for the selected Category Code. If a change to the Account is necessary modify the Category Code and save again. [OK]
18.	On the Confirmation page, you'll see the assigned Requisition ID. **Budget Check** your requisition. by clicking on the [Check Budget] link.	**Confirmation** Your requisition has been submitted. Requested For Requisition Name 0000008910 Requisition ID 0000008910 Business Unit MDJUD Status Approved Priority Medium Budget Status Not Checked Number of Lines 1 Total Amount 1,000.00 USD View printable version Edit This Requisition Check Budget Create New Requisition Manage Requisitions

19.	After the budget check is complete, verify that the **Budget Status is Valid**. Depending on the rules that apply to your area, your Requisition will be routed for the necessary Approvals. You'll receive email notifications and Worklist Items in your Worklist when: A. Your Requisition has been **Approved**. B. The PO associated with your requisition is **Dispatched** to the Vendor.	**Confirmation** Your requisition has been submitted. Requested For　. Requisition Name　0000008910 Requisition ID　0000008910 Business Unit　MDJUD Status　Approved Priority　Medium Budget Status　Valid Number of Lines　1 Total Amount　1,000.00 USD Pre-Encumbrance Balance　1000.00 USD View printable version　　Edit This Requisition Create New Requisition　　Manage Requisitions

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